

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

5. Review Documents

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| 5.1 | Introduction | This procedure describes the process to review a document in CSPS. The document review process is an optional level of review. A document can be reviewed when a reviewer accesses the “Document Review Screen” (WFR005). All documents which the reviewer has available to be reviewed appear on the WFR005. This process is no longer available once the requisitioner or buyer has approved the document. |
| 5.2 | Who Performs the Procedure | The reviewer established on the document’s “WFR006 - Document Review Routing Sequence” Screen will have access to the document. |
| 5.3 | Initiating the Process | When the “OK” button is clicked on the “WFR006 - Document Review Routing Sequence” Screen, the first reviewer without a “COMPLETE” flag checked on WFR006 will be able to review the document via the “WFR005 - Document Review Screen”. |
| 5.4 | Accessing the System | From the Main Menu, select Transaction. From the Transaction menu, select Admin. From the Admin menu, select “WFR005 - Document Review Screen” to review a document. Follow the steps below for WFR005. |

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5.5

Reviewing a Document

This procedure describes the steps necessary to review a document.

WFR005 - Document Review Screen

[illegible]

STEP	ACTION
WFR005 - Document Review Screen	
1.	The TYPE field is system generated based upon the document type of the document to be reviewed.

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STEP	ACTION
2.	<p>Double click on a document in the NUMBER field. The document will appear.</p> <p>a. Edit any incorrect information in the document.</p> <p>Note: The document's creator can access their document at any point to see changes made or to approve it. All reviewers need not review the document for the creator to approve it. The review routing is optional and does not bind the creator. In addition, the system keeps a record of who approved the document. If the document has been approved prior to the completion of the review process, then the system will still have a record of those reviewers who had not completed their review.</p> <p>b. After the document has been reviewed/edited, return to the first page of the document.</p> <p>c. Click on the "FORWARD" button. "WFR006 - Document Review Routing Sequence Screen" appears.</p>
WFR006 - Document Review Routing Sequence	

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STEP	ACTION
3.	<p>a. Enter a comment in the NOTES field which indicates which changes had been made. This comment will indicate to other reviewers changes have been made. The comment will also appear on future reviewers' WFR006 Screen as well as on the creator's original document.</p> <p>b. To change review routing order, proceed to 'Step c'. Otherwise proceed to 'Step d'.</p> <p>c. Add, delete, or resequence reviewers:</p> <p>(i) To add a reviewer:</p> <ol style="list-style-type: none"> Place the cursor on the line above where the new reviewer should appear. Click the "Green Plus" Icon in the toolbar. Double click on the EMP NO field or click the "LIST" button to access the Employee Lookup Screen (PRR001). Click the "Enter Query" icon and enter the last name of the employee that is to review the document in the "Last Name" field. Click the "Execute Query" icon. Select an employee, then click "OK". <p>Note: The EMPLOYEE NAME will default based on the EMP NO field. The SEQ NO represents the order in which reviewers may view the document.</p> <ol style="list-style-type: none"> A reviewer cannot be added before the current reviewer, only after the current reviewer. Repeat 'Step (i)' to add more reviewers.
	<p>(ii) To delete a reviewer:</p> <ol style="list-style-type: none"> Place the cursor on the reviewer to be deleted. Click the "Red X" icon on the toolbar. <p>Note: The user cannot delete themselves from the review routing if they are the current reviewer.</p> <ol style="list-style-type: none"> Repeat 'Step (ii)' to delete more reviewers.

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STEP	ACTION
	<p>(iii) To re-sequence a reviewer:</p> <ol style="list-style-type: none"> 1. Highlight the specific EMP NO. Click either the UP or DOWN 'RE-SEQ' arrow. Each click will shift the reviewer up or down one spot. <p>Note: A reviewer may be re-sequenced as long as the COMPLETE flag has not been checked for that reviewer. The user may not re-sequence themselves if they are the current reviewer</p> <ol style="list-style-type: none"> 2. Repeat 'Step (iii)' until all reviewers are in the proper order.
	<p>d. Click "OK" after completing the document review.</p> <p>Note: By clicking "OK", the COMPLETE flag is automatically checked. This indicates the reviewer has completed reviewing the document.</p> <ol style="list-style-type: none"> (i) A message will then be sent to the next reviewer if there are any remaining reviewers, otherwise the document's creator will receive a message on WF003 that the review process has been completed. (ii) If the reviewer is the creator of the document, then upon clicking "OK" s/he will return to either FM030 p1 or FM041 p1. (iii) The document will disappear from WFR005 and will not be accessible to the reviewer. <p>Note: To make additional changes to the document, click the "CANCEL" button to exit WFR006 and return to WFR005.</p>